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# Foreign Crops and MARKETS



VOLUME 53

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Wheat Stocks in Four Leading Export Countries Smallest Since 1938. Continued Heavy World Demand Will Increase Dependence on Current Crop (Page 103)

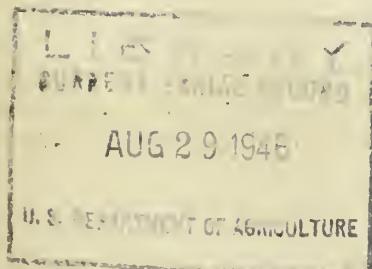
Netherlands Indies to Sell Exportable Surplus of Copra to U. S. or Designees in Return for Help in Obtaining Needed Consumer Goods (Page 104)

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## L A T E      N E W S

French crops for 1946 (1945 production in parentheses) according to official estimates, are estimated as follows: Potatoes, 13.2 million short tons (8.4 million short tons); dry legumes, 116,600 short tons (94,325 short tons); and apples and pears for cider, 2.2 million short tons (pre-war 3.3 million short tons). The condition of apples and pears is reported as satisfactory. No official estimates on cereals are available this month, but the next estimates expected in September may show some increases over those reported previously.

Future meat supplies in Rumania are jeopardized by forced sale of livestock because of drought. The Under Secretary of State for Agriculture has been given authority to conduct a cattle-buying program to preserve meat for the winter and to stabilize prices during this feed scarcity. Forage conservation will be pressed to save breeding stock and work animals.

Reports from Norway indicate that milk production is still continuing to increase although it is believed that the seasonal high point is being attained. Pastures throughout the country are, for the most part, very good, and milk is being produced in more areas in considerable surplus over immediate requirements. Reports indicate that milk production in the Province of Rogaland is equal to prewar, but for the country as a whole, output is still less than prewar.

Third official estimate places the 1945-46 Argentine cotton crop at 310,000 bales (of 478 pounds net), compared with the third 1944-45 estimate of 333,000 and final estimate of 332,000 bales.

Chile's first forecast of grain plantings for 1946-47 are as follows (1945-46 figures in parentheses): Wheat, 1,878,044 acres (1,803,185 acres); oats, 236,919 acres (203,423 acres); and barley, 135,752 acres (110,150 acres).

The Norwegian Ministry of Supply has announced that contracts for a total of 110,000 short tons of corn for summer and fall delivery have been made with Argentina. This amount is expected to insure greater rations of carbohydrate feed for livestock than were available last winter.

\* \* \* \* \*

## WHEAT STOCKS IN CHIEF EXPORT COUNTRIES LOWEST SINCE 1938

Reflecting the unprecedented world demand for bread grains during the past year, stocks of wheat on July 1 in the principal exporting countries were at the lowest level since 1938. Total wheat supplies in Argentina, Australia, Canada, and the United States on July 1 were estimated at 373 million bushels--about 450 million bushels less than a year ago and well below the prewar (1935-1939) average of 457 million bushels. Although quantitative estimates of stocks in many other areas were not available as of July 1, world wheat reserves were known to be at an uncomfortably low level at that time. With a large world demand for bread grains again in prospect for the coming year, the low level of stocks emphasizes the dependence on current production for supplies during 1946-47.

The greatest decline from a year earlier in wheat stocks occurred in Canada with an indicated decrease of 228 million bushels. In the United States, July 1 stocks were reduced by 180 million bushels, and supplies in Argentina also were lower. Only in Australia, where the 1945-46 crop was almost treble that of 1944-45, were stocks above the level of a year ago. July 1 stocks in the Southern Hemisphere, of course, represent "mid-season" supplies. Canada's wheat year closes July 31, 1 month later than in the United States. In all cases, however, the estimates have been adjusted to measure total supplies as of July 1.

WHEAT: Estimated stocks in the principal exporting countries,  
July 1, 1946, with comparisons a/

Year	United	Canada	Argentina	Australia	Total
	States				
	Million bushels	Million bushels	Million bushels	Million bushels	Million bushels
Average -	:	:	:	:	:
1935-1939 .....	155	121	121	60	457
1940 .....	280	322	102	135	839
1941 .....	285	517	201	75	1,178
1942 .....	632	449	238	142	1,461
1943 .....	622	630	228	200	1,740
1944 .....	317	400	290	159	1,166
1945 .....	281	318	175	50	824
1946 b/ .....	101	90	115	67	373
	:	:	:	:	:

Compiled from official and unofficial data.

a/ For countries other than the United States stocks adjusted to a July 1 basis from official data at the beginning of the crop year, that is, year beginning August 1 for Canada, December 1 for Argentina and Australia.

b/ Preliminary estimate.

Note: Information on July 1 stocks of coarse grains is not available at this time.

The total reduction of wheat supplies in the four countries marked the third successive year of substantial declines. The peak of about 1,740 million bushels was reached on July 1, 1943, as a result of the dislocations

in world trade under war conditions, and reflected a steady increase in world wheat supplies from the low point of stocks in these countries of about 250 million bushels on July 1, 1937, up to 1943.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the OFAR Committee on Foreign Crop and Livestock Statistics. For this report the Committee was composed of Joseph A. Becker, Chairman, C. M. Purves, R. L. Gastineau, Judith E. Downey, M. W. Wright, and Oscar K. Moore.

### COMMODITY DEVELOPMENTS

#### FATS AND OILS

##### NETHERLANDS INDIES-U. S. SIGN COPRA AGREEMENT

The Netherland Indies Government, under the terms of a Copra Purchase Agreement signed August 15 in Washington, has agreed to sell the exportable surplus of **copra** to the Commodity Credit Corporation, its designee, or to claimants having International Emergency Food Council allocations. The Agreement will be for 1 year beginning September 1, 1946. Copra prices will be \$103 per long ton, f.o.b., the same as those stated in the Philippine Copra Agreement signed on August 8.

To assist in the rehabilitation of the copra industry the United States will help to obtain allocations and priorities for trade goods and other equipment. In addition, technical personnel will be sent to the Netherlands Indies to aid in the construction of inter-island craft. Money will be advanced to the Netherlands Indies by the Commodity Credit Corporation for the purchase of these-needed supplies. The loan will be repaid by receipts from the sale of copra.

It has been estimated that in the next 12 months about 300,000 long tons of copra will be exported to aid in overcoming the world shortage in fats and oils. The exportable surplus will originate in areas under the control of the Dutch. This compares with the prewar exports of about 530,000 long tons of copra and coconut oil, in terms of copra.

The Netherlands Indies is considered to be the world's largest producer of coconuts. While no official estimates are available for the total amount of copra produced, in prewar years the annual output was around 1.2 million long tons. In western Borneo and the Celebes native cultivation of coconuts is of prime importance. Makassar in the Celebes is the most important concentration center.

**CUBA CONTROLS EDIBLE  
FATS DISTRIBUTION**

Because of the shortage of edible fats, which was made more acute when imports from the United States were retarded as a result of the abandonment of price controls, the Cuban Government has enacted new measures regulating distribution of lard and vegetable oils. The specific price ceilings on lard have temporarily been lifted for a period of 3 months in order to enable importers to purchase at the high prices quoted in the United States early in July. Cuban buyers are unwilling to purchase products, however, until the situation is clarified concerning the reestablishment of ceiling prices in the United States.

Cuban peanut-production estimates for 1946 range from 60 to 100 million pounds. However, a conservative forecast for oil production indicates 12 million pounds as against 10 million in 1945. Mills started crushing about the middle of August.

Lard production in July is estimated at about 600,000 pounds. Output of butter was negligible. Increased slaughter of cattle permitted a slightly greater tallow production, but only a small quantity reached soap manufacturers.

Consumption of fats and oils has been limited entirely by the availability of supplies. About 5 million pounds of lard and about 1.5 million pounds of edible oil were consumed during July. This represents only about half the consumer demand. Soap factories have been operating intermittently, and production is larger than at any time previously this year although it is still far below normal.

Imports of principal fats and oils during the first 7 months of 1946 amounted to approximately 47 million pounds, compared with about 41 million for the same months of 1945. Lard arrivals, amounting to less than 2 million pounds in July, were far below the 5-million-monthly normal. However, total receipts from January 1 show 36.4 million pounds, whereas the 7-month allocation called for only 35 million. All lard imports originated in the United States. January-July arrivals of tallow were 4.7 million pounds, or 1.4 million less than those for the same period of 1945; arrivals of animal grease were only 800,000 pounds, 2.2 million less than those of a year ago. On the other hand, imports of linseed oil, coming chiefly from Uruguay, were 2.3 million pounds, almost 1 million larger than in January-July 1945. They have amply met Cuba's requirements.

Arrivals of the following oils: coconut, ouricuri, babassu, tallow, palm, castor, and inedible peanuts, amounted to 2.8 million pounds during January-July 1946; no shipments of these were received during January-July 1945. Spanish olive oil arrived in almost prewar volume, most of it in transit through the United States. Over 500,000 pounds were received in July, and imports for the year thus far amount to almost a million.

Recorded receipts of soap fats during July included some 900,000 pounds of coconut oil and over 500,000 pounds of tallow and grease, all from the

United States. Among receipts of finished soap were 414,600 pounds from Argentina. Total soap imports from this source since January 1 are over 6 million.

Stocks of edible fats and oils are negligible. Stocks of soap fats are insignificant except for coconut oil, of which probably 2 or 3 hundred thousand pounds are now held by soap manufacturers. Linseed-oil stocks are adequate, amounting to about 400,000 pounds.

#### CANADA SETS PRICES ON FLAXSEED FOR CRUSHING

Canadian flaxseed sold to domestic crushers, manufacturers of feed, breakfast or cereal food, and pharmaceutical products during the 1946-47 crop year (August through July), must be on the basis of \$2.75 per bushel for No. 1 Canada western, basis in store Fort William/Port Arthur, and for No. 1 Canada eastern flaxseed, basis in store Montreal. Other grades are from 4 to 17 cents per bushel lower.

Country sales and shipments to domestic crushers are now on an allotment basis and will continue so until such time as sufficient new crop flaxseed is available. Crushers who purchase seed from the Wheat Board at \$2.75 may make sales of flaxseed for seed or feed purposes at \$3.25 per bushel, provided that such sales are reported at the end of each month and that remittance of 50 cents per bushel is forwarded to the Board with the report. The Canadian Government is paying producers \$3.25 per bushel for No. 1 flaxseed.

#### MEXICAN FATS, OILS SHORTAGE CONTINUES

Mexican lard and vegetable oils continue to be in extremely short supply. The 1946 production of vegetable oils is forecast at approximately 94,000 short tons, compared with the 1945 estimated production of 96,000 and the 1944 production of 116,000. The decline in this year's output is expected to result from the decreased production of cottonseed and some other oil seeds in 1945 and 1946.

Feed shortages indicate some reduction in the 1946 lard output from the 1945 production of 30,000 tons. The Government is considering restricting imports of fats and oils to a national organization which will attempt to effect an equitable distribution at reasonable prices.

#### TOBACCO

#### U. S. TOBACCO EXPORTS CONTINUE TO INCREASE

United States exports of unmanufactured tobacco for the first 6 months of 1946 amounted to about 327 million pounds (declared weight) with a valuation of \$171,710,000, compared with 264 million pounds (valuation \$135,731,000).

for a similar period a year ago. About 273 million pounds, or 84 percent of total exports during the 1946 period, consisted of flue-cured. Fire-cured exports totaled 19.7 million pounds, compared with 27.7 million during the first 6 months of last year. Burley exports, amounting to 15.3 million pounds, were nearly 6 times as large as those for the first half of 1945.

During the first 6 months of 1946, flue-cured exports went to some 50 countries and dependencies. About 197 million pounds, or 72 percent of total flue-cured exports, went to the United Kingdom. Australia took 15.8 million pounds and China 10.6 million. Other leading purchasers of flue-cured were Belgium with 7.3, New Zealand 6.3, and India 5.1 million pounds. Total exports of flue-cured were about 21 percent larger than the exports of this class for the first half of 1945.

UNITED STATES: Exports of unmanufactured tobacco,  
declared weight, January-June 1946 a/

	1946					
	January- March	April	May	June	Total : 6 months	
:	1,000	1,000	1,000	1,000	1,000	1,000
:	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>
Flue-cured .....	128,568	49,528	45,573	49,323	272,992	
Kentucky-Tennessee						
fire-cured .....	2,475	4,055	4,453	4,897	15,880	
Virginia fire-cured ..	932	710	1,486	701	3,829	
Burley .....	1,604	3,676	5,266	4,797	15,343	
Maryland .....	1,017	390	1,159	115	2,681	
One-Sucker .....	223	26	299	0	548	
Green River .....	954	85	549	13	1,601	
Black Fat, etc. ....	942	480	1,140	429	2,991	
Cigar .....	1,806	203	755	253	3,017	
Perique .....	11	67	7	0	85	
Stems, trimmings, and						
scrap .....	4,936	1,181	1,606	212	7,935	
Total .....	143,468	60,401	62,293	60,740	326,902	
Value (1,000 dollars) ..	76,633	32,264	32,404	30,409	171,710	
:	:	:	:	:	:	

Records of the Bureau of the Census. a/ Preliminary

Exports of Kentucky-Tennessee fire-cured, totaling 15.9 million pounds for the first half of 1946, went chiefly to France, Switzerland, Sweden, and the Netherlands. Exports of Virginia fire-cured went largely to Sweden, Switzerland, and Norway. Total exports of fire-cured were only 71 percent of those during the first 6 months of 1945, because of the short supply available for shipment abroad.

Burley exports during the first 6 months of 1946 went to some 35 countries and dependencies. France, which took 6 million pounds, was the principal customer for Burley. Other important purchasers were Portugal, Mexico, and Norway. Total 6-month exports of Burley were considerably above the average annual shipments of 10.6 million pounds for the prewar (1935-1939) period.

Maryland exports of 2.7 million pounds were destined chiefly to Switzerland and the Netherlands. One-sucker exports were shipped principally to France and West African countries. Green-River went largely to France. Nigeria and the Gold Coast continued to be the principal markets for Black-Fat. Exports of cigar leaf, which totaled 3 million pounds, were chiefly to Belgium, Denmark, the United Kingdom, and Switzerland. China was the destination of the bulk of exports of stems, trimmings, and scrap, amounting to nearly 8 million pounds.

#### CHINA'S CIGARETTE OUTPUT BELOW PREWAR

Cigarette production in Shanghai factories during the first half of 1946 totaled about 15 billion pieces, or only about 50 percent of the prewar level, a recent cable discloses. No reports are available regarding cigarette production in other Chinese cities, but the rate of manufacture is believed to be below the level in Shanghai factories.

Imports of cigarettes, however, are reported to be running above the prewar average of 288 million pieces annually. Most of the imported cigarettes are of United States origin. American blended cigarettes are reported to have gained wide popularity with Shanghai consumers since liberation.

Most recent estimates place China's flue-cured crop at a maximum of 90 million pounds, compared with average production during the 1935-39 period of about 150 million pounds. Not more than 60 to 70 million pounds of the current crop is expected to reach large consuming centers owing to unsettled conditions. In addition, the quality of the leaf is regarded as poor.

The limited supplies of native leaf available for cigarette manufacture and heavy consumer demands point toward larger imports of leaf, particularly United States flue-cured. Based on a potential leaf requirement of 120 million pounds for cigarettes during the season beginning October 1, about one half of this amount would have to be obtained from abroad.

#### COTTON AND OTHER FIBERS 1/

#### COTTON STOCKS IN CHINA AT HIGH LEVEL

The China cotton situation is characterized by large stocks of imported cotton with mill operations still much below prewar levels, according to a report prepared by Agriculture Commissioner Fred Taylor, who has returned from China recently. Stocks of foreign-grown cotton on

1/ This Section is continued on page 113.

hand in China at the end of July 1946 are estimated at 800,000 bales (of 500 pounds gross), which are equivalent to consumption requirements of imported cotton for at least 11 months of 1946-47. Further scheduled arrivals for the 6 months to the end of January 1947 include about 275,000 bales (practically all United States) from UNRRA stocks and 70,000 bales (mostly United States) from commercial sources.

Assuming that a minimum of 500,000 bales of Chinese cotton will be available to the mills before August 1, 1947, the supply on hand/in prospect for 1946-47 would cover China's estimated mill requirements until that time and leave a carry-over sufficient for a month's consumption.

The UNRRA commitment amounts to about 560,000 bales, 285,000 of which were scheduled for arrival in China before the end of July. Of the 890,000 bales of commercial sales shipped or committed for shipment to China since V-J Day, about 650,000 arrived prior to May 15, 1946, 170,000 more were expected before the end of July, and 70,000 additional bales before the end of January 1947. The total of 890,000 bales was divided roughly as follows: 43 percent United States, 30 percent Brazilian, 14 percent Mexican, 7 percent Indian, and 6 percent others, including 35,000 bales of Paraguayan, and 4,000 of Argentine cotton.

The cotton of Latin American origin (about 430,000 bales) was around 1 inch staple, Strict Low Middling, and Middling. Practically all of it was shipped on a consignment basis, arrived before the end of May and was quickly sold at prices somewhat below those for comparable grades of American after the 4-cent deduction. Current quotations for Chinese cotton are 15 to 20 percent higher than those for American. Initial sales of American were limited to some extent by the scarcity of the better grades and the resulting higher prices. Actual spinner demand was mostly for American Middling 7/8 inch staple but the scarcity encouraged a shift to Brazilian and Mexican as these qualities were available immediately.

Added to the heavy stocks of foreign-grown cotton is the 1946 crop in China estimated at 1,675,000 bales (of 478 pounds net), of which between 500,000 and 800,000 bales are expected to be available to spinning mills during the year beginning August 1, 1946. This quantity added to August 1 stocks (800,000 bales) of foreign cotton, 345,000 bales expected arrivals, and unreported stocks of Chinese cotton on hand August 1 makes an available supply of well over the 1,430,000 bales, estimated requirements by the mills during the year ending July 31, 1947.

Docks, port, and warehouse facilities were already overtaxed in May to find space for shipments that arrived prior to that month. The Chinese Government may be expected to limit the granting of exchange for further purchases of foreign cotton until such quantities of native cotton as may be offered have been sold.

Cotton mill consumption in China during the year ended July 31, 1946, is estimated at only 650,000 bales, including 200,000 of native cotton, as the mills did not begin operations on a substantial scale until November

and December 1945. Recovery has been slow since that time because of wartime destruction, deterioration, and removal of machinery, and shortages of experienced labor, spare parts for mill equipment, coal for power plants, and raw cotton. Consumption had reached a level of about 100,000 bales monthly in June 1946, and is expected to rise gradually to about 133,000 bales by July 1947 as additional spindles are brought into operation, making an estimated consumption total for 1946-47 of 1,432,000 bales.

This estimate is based on the assumption that 2.4 million of the 3.9 million spindles (5,071,000 in 1937) capable of operation will be in operation as of August 1, 1946. The number in operation is expected to increase by about 10,000 monthly until January 1947 and 50,000 thereafter to a total of 3,200,000 in July 1947 and 3,800,000 in July 1948. The consumption estimate is calculated on the basis of cotton consumption of 250 pounds per spindle per year. On this basis, consumption in 1947-48 may approximate 2,100,000 bales. Consumption of cotton on hand spindles, and in the making of mattresses, padding for garments and similar uses, estimated in 1940 and 1941 at about 100,000 bales monthly, has not been considered in this report.

Cotton mills in north China (mostly Tsingtao and Tientsin) did not suffer any direct military damage as did those in the Shanghai area. The mills are still severely handicapped by political unrest in north China, lack of coal and other raw materials, poor condition of power plants, shortage of parts for mill machinery, inadequate transportation, and shortage of labor. The number of spindles in Tsingtao and Tientsin in May 1946 was reported at 857,659, of which only 391,712, or 45.6 percent, were in operation and they were on a basis of one 10-hour shift. Based on a normal 2-shift basis, the percent operation is about 22.8 percent of capacity. No definite information is available concerning the mills in Manchuria reported by the Japanese to have had, in prewar years, about 557,000 spindles. Estimates of spindles remaining in Manchuria as of March 1946 vary from 222,000 to 280,000. A substantial percentage of the power plants are reported to have been destroyed or removed.

Mills in the Shanghai area, representing about 52 percent of all cotton spindles in China in 1937 and 51 percent of the looms, are handicapped by military destruction as well as the factors mentioned above. Only one of the four power plants operating in Shanghai before the war was in operation in May 1946 and it (Shanghai Power Company, largest of the four) was operating on domestic coal (50 percent) and fuel oil (50 percent), the latter furnished by the United States Navy. About 41.7 percent of the combined prewar generating capacity of the four plants was destroyed during the war, the three small plants being completely destroyed, and the other suffered about 25 percent destruction.

The Textile Control Commission was organized on November 10, 1945, under the direction of the Ministry of Economic Affairs with power to confiscate and operate all Japanese and puppet-owned textile mills in China. This Commission in turn organized the China Textile Industries, Inc. on November 27, 1945, as a company to take over and operate the mills, a function that was actually started in September 1945 by a group of technicians ap-

pointed by the Ministry. Between January 15, 1946, when it began functioning and March 1, the corporation had taken over 48 mills with a total of 1,665,216 spindles and 32,807 looms. Changes in mill capacity since 1937 are shown in the table below as reported by the China Textile Industries, Incorporated.

CHINA: Cotton mills, spindles, and looms by nationality of ownership, 1937 and 1946

Nationality :	1937			March 1, 1946		
of ownership	Mills number	Spindles	Looms	Mills	Spindles	Power looms
Chinese .....	96	2,746,392	25,503	<u>a/</u>	<u>b/</u> 1,842,000	<u>a/</u>
Japanese .....	48	2,135,068	28,915	<u>a/</u>	<u>c/</u>	<u>a/</u>
British .....	4	221,336	4,021	<u>d/</u>	<u>d/</u>	<u>d/</u>
Chinese Government .....	-	-	-	48	1,665,216	32,807
Total .....	148	5,102,796	58,439	<u>a/</u>	<u>a/</u> 3,900,000	<u>a/</u>
	:	:	:	:	:	:

China Textile Industries, Inc.

a/ Not available.

b/ Figure supplied by Japanese sources as of August 1945.

c/ Japanese-owned mills in locations outside Shanghai, Tsingtao, and Tientsin not formally taken over by the Chinese Government at the time of this report. Japanese report 436,000 spindles in mills owned jointly with Chinese as of August 1945.

d/ All British-owned equipment was scrapped, dispersed, or placed in storage.

e/ Rounded figure accepted by Textile Mission as average of estimates from various sources.

#### LIVESTOCK AND ANIMAL PRODUCTS

##### FRANCE REVISES

##### MEAT RATION

New regulations governing the distribution of meat have been issued by the French Ministry of Food. Effective August 1, the meat ration was raised from 250 grams per week to 300 grams. Only 150 grams will be available at the official price, however, and the remainder will be offered in a free market. The official retail price of first choice fresh beef in Paris is reported at about the equivalent of 56 cents per pound, while free prices range up to \$1.15 per pound. This is lower than the free price reported in June when fresh meat sold at \$1.25 to \$1.50 in Paris and at lower prices in smaller cities.

The meat ration for normal adults had stood at 250 grams per week for sometime. Actual consumption was somewhat less during the early part of the year, but in Paris the official distribution averaged 940 grams in June, and the ration was fully met in July. Very little fresh meat has been available on the ration heretofore. The July distribution consisted of a processed pork and beef mixture. A canned-meat and vegetable combination of American and Canadian origin, formerly issued as the meat ration, is now available on the free market.

ARGENTINA SHIPS EUROPE  
REFRIGERATED MEAT

Argentine shipments of refrigerated meat to Europe, which were resumed last September, reached 115 million pounds up to July 1, 1946. This quantity of meat was within the allocations recommended by the Combined Food Board and moved to Belgium, France, and the Netherlands under the sixth bulk-purchase agreement between the British Ministry of Food and Argentina.

ARGENTINA: Refrigerated-meat shipments to specified countries,  
September 18, 1945, through July 1, 1946

Country	Mutton and:				Total
	Beef	lamb	Pork	Offal	
	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000
	: pounds	: pounds	: pounds	: pounds	: pounds
Belgium .....	22,940	12,727	6,471	1,629	43,767
France .....	28,829	18,014	6,982	2,175	56,000
Netherlands .....	4,321	5,092	4,713	878	15,004
Total .....	56,090	35,833	18,166	4,682	114,771
	:	:	:	:	:

GRAINS, GRAIN PRODUCTS, AND FEEDS

ARGENTINE WHEAT  
SEEDINGS INCREASED

First estimates of the acreage of wheat sown or to be sown for harvest during 1946-47 in Argentina place the total at 16,549,000 acres. This is an increase of 16 percent over the revised estimate of 14,238,000 acres planted last year, and compares with the prewar (1935-39) average of 18,663,000 acres.

Reports indicate that moisture supplies have been ample and that much of the acreage was seeded under generally favorable conditions, although excessive rains have delayed seedings in some areas. Yields per planted acre during recent years have ranged from 7 to nearly 18 bushels per acre. With this variation in mind, and using the 10-year (1935-44) average yield of 12.7 bushels per planted acre, wheat production during the coming year could exceed 200 million bushels. Such a total, if realized, would be well above last year's harvest of about 145 million bushels and would approach the prewar average of 222 million bushels.

MISCELLANEOUS

TRADE CONTROLS

Czechoslovakia and Bulgaria concluded a new trade agreement to be in effect until June 30, 1947. Bulgaria is to supply tobacco, hides, sausage casings, and other farm products. Czechoslovakia will furnish farm implements and other industrial products. Trade is to be based on clearing system instead of on a barter as in preceding agreements.

The Peruvian Guano Monopoly has been authorized to import and sell all kinds of fertilizers. Such importations are exempt from duty and will be sold at cost. The organization's operations were formerly confined to control over the production and distribution of guano.

An Argentine-Ecuadoran agreement was signed on August 5, 1946. Argentina will furnish 10,000 tons of wheat at fixed prices and certain quantities of cattle, sheep, pigs, and goats. In exchange, Ecuador will furnish natural rubber at prices to be agreed upon in each particular transaction.

A Foreign commerce Control Commission (Comision de Control de Comercio Exterior), whose principal function is to control imports and exports through specialized committees, was established in Mexico recently. Import committees have been established for hides, fats and oils, wheat, and various industrial products. Established export committees include cotton and cotton textiles, chewing gum, and beer, while a committee has been authorized for wool.

The Commission is charged with the responsibility of protecting the interests of domestic producers and consumers and of considering the effect of any proposed restriction upon the industry concerned and upon the economy as a whole.

#### COTTON AND OTHER FIBERS (con't)

##### WEEKLY COTTON PRICES ON FOREIGN MARKETS

COTTON: Spot prices of certain foreign growths  
and qualities in specific markets

Market location, kind, and quality	Date 1946	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U. S. cents per pound
Alexandria	:	Kantar	:	:	:
Ashmouni, F.G.F. . . .	:8-15	: 99.05 lbs.	:Tallari	: 38.00	: 31.72
Giza 7, F.G.F. . . .	:8-15	: 99.05 lbs.	:Tallari	: Not quoted	
Karnak, F.G.F. . . .	:8-15	: 99.05 lbs.	:Tallari	: Not quoted	
Bombay	:	Candy	:	:	:
Jarila, fine . . . . .	:8-15	: 784 lbs.	:Rupee	: 440.00	: 16.94
Kampala, East African	:8-15	: 784 lbs.	:Rupee	: 850.00	: 32.72
Buenos Aires	:	Metric ton	:	:	:
Type B . . . . .	:8-17	: 2204.6 lbs.	:Peso	: 2070.00	: 27.96
Lima	:	Sp.quintal	:	:	:
Tanguis, Type 5 . . . .	:8-17	: 101.4 lbs.	:Sol	: 189.00	: 28.67
Recife	:	Arroba	:	:	:
Mata, Type 5 . . . . .	:8-16	: 33.07 lbs.	:Cruzeiro	: 135.00	: 21.78
Sertao, Type 5 . . . .	:8-16	: 33.07 lbs.	:Cruzeiro	: 135.00	: 21.78
Sao Paulo	:	Arroba	:	:	:
Sao Paulo, Type 5 . . .	:8-16	: 33.07 lbs.	:Cruzeiro	: 166.50	: 26.87
Torreon	:	Sp.quintal	:	:	:
Middling, 15/16" . . . .	:8-16	: 101.4 lbs.	:Peso	: 126.25	: 25.64

Compiled from weekly cables from representatives abroad.

